WisWap PHASE II

User Guide

November 10, 2004

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1. Navigation and System Layout and Settings

1.1 General System

User Ids and Passwords must be at least 6 characters long.

Passwords are case sensitive.

Logging onto the WisWap takes you to the Home Page.

System assigned ID's will be underlined and blue and will take a user to either a Summary page or the View/Edit page for that item.

Navigation to Applications and Jobs will be through the links off of the building summary page.

Fields marked with an asterisk * are required data entry fields.

Field specific help will be available in some places. Click the ? to display the help text.

Where a ± is seen to the left of a row this indicates there is additional information that is hidden. By clicking the ± you can expand and hide the associated information.

1.2 Menu Bar

WisWap has one horizontal menu for navigating to different modules of the system.

Place your mouse over a menu to expand that menu. Click on menu items to navigate.

1.2.1 Main

The Main menu item contains links to:

Home: Takes the user to the system home page.

My Settings:

Settings for your contact profile:

- Change Password: Allows user to reset their password.
- My Contact Details: Allows user to view their contact information.

Log Out: Logs the user out of the system. **Always use this function to end a session.**

1.2.2 Buildings

The Building menu item contains links to:

Add Building:	Takes the user to the search page to begin the process of adding a new building record to the database. This is the only place new buildings may be added.
View/Edit Building:	Takes the user to the search page to begin a search for an existing building, and associated job or application records.

1.2.3 Invoices

The Invoice menu item contains links to:

Add Invoice:	Takes the user to the search page to begin the process of adding a new invoice record to the database. This is the only place new invoices may be added.
View/Edit Invoice:	Takes the user to the search page to begin a search for an existing invoice record.

1.2.4 Contracts

The Contracts menu item contains links to:

Add Contract:	Takes the user to the search page to begin the process of adding a new contract to the database. (DOE Only)
View/Edit Contract:	Takes the user to the search page to begin a search for an existing contract record.
Upload Contract Line Item:	Takes the user to the Contract Line Item Upload page where the user selects a spreadsheet to upload to the system. (DOE Only)
Upload Contract Plan:	Takes the user to the Contract Plan Upload page where the user may select a spreadsheet to upload to the system. (DOE Only)

1.2.5 Admin

The Admin menu contains links to:

- Contact User Maintenance:
  - Add Contact: Takes the user to the search page to begin the process of adding a new contact to the database.

- View/Edit Contact: Takes the user to the search page to begin a search for an existing contact record.

- Measure Maintenance:
  - Contract Year Measures: For DOE use to create measures for a particular contract year.
  - Set Grantee Measure Defaults: Takes the user to the Grantee Measure Costs page.

- Look Up Table Maintenance:
  - Look Up Tables: For DOE to access both editable and non-editable system look up tables.
  - Fuel Vendor: For DOE to add/edit fuel vendor information.
  - Income Type: For DOE to add/edit income types.

- Contract Year Set-up:
  - Contract Year Default Settings: Allows DOE to set default contract begin/end/close-out dates.
  - Contract Line Item Maintenance: Allows DOE to establish by line item whether that line item may exceed its budget and/or whether that line item may lend to another line item.
  - Federal Income Limits: Allows DOE to add/edit federal income limits used in determining household eligibility.

- General System Settings: Allows DOE to edit system mail to and from address,

  establish small building threshold number, and reweatherization guidelines.

- Grantee Maintenance: Allows DOE to add a new grantee and edit existing.

- Error Reports: Allows DOE and DET to view, edit, and manage system error reports.

1.2.6 Search

The Search menu contains links to:

View/Edit Applicant: Takes the user to the search page to begin a search for an existing applicant record.

View/Edit Contact: Takes the user to the search page to begin a search for an existing contact record.

1.2.6 Reports

The Reports menu item contains links to available reports. Refer to the Report User Guide for detail information on each report.

1.2.7 System Settings

The system was designed for 800X600 resolution, however we are recommending 1024X768. The higher resolution will require less scrolling.

Portions of the system are protected by SSL (Secure Socket Layers) encryption. To reduce the number of pop-up messages you receive make the following settings on your web browser:

Click on:

Tools | Internet Options | Advanced

Under the Security section **Uncheck** the following items:

- Do not save encrypted pages
- Warn if changing between secure and not secure mode

And,

Check the following items:

- Empty Temporary Internet Files Folder when Browser is Closed

Still on the Advanced Tab under the Browsing section **Check** the following item:

- Show friendly HTTP Error Messages.

We strongly recommend that all data entry users of WisWap have a scrolling mouse.

2. Logon

2.1 Passwords

Usernames and Passwords have been brought over from the old system. If your current password is less than six characters then enough zeros have been added on to the end to make it six characters long.

2.2 Forgotten Password

If you forget your password click the “Click Here” link on the login page. You will be required to enter your email address and last name. The system will send you an email with a new system generated password and your existing username. This function will not work if you have more than one contact record with the same email address. All users should have separate email addresses.

3. Contact Records

Contact records contain information necessary for a user to access and utilize the WisWap system including: name, address, organization, email address, security group, and security roles.

3.1 Creating a New Contact Record

Only users with Grantee Admin or DOE status may add new users to the system.

Users with the Contact Assign Roles security may assign staff roles in WisWap.

To add a contact to the system click Admin | Add Contact. Fill in all the required information and assign the security roles you wish the user to have and save the record.

Tip: Make sure the email address is unique and correct.

The new user will receive an email to the email address entered on the contact record with their username and password.

3.2 Editing a Contact Record

Each user of WisWap may edit their own contact record information, except that, only Grantee Admin and DOE users may add or remove security roles or activate/inactivate a contact record. Grantee Admin users may edit all contact records for their grantee. DOE users may edit all contact records.

To edit a contact record click Admin | View/Edit Contact and enter your search criteria. If one record is returned you will be taken to the Contact Edit page for that user. If multiple records are returned select the correct record by clicking on the underlined last name in the search results.

3.3 Security Roles/Functions

****See Appendix A****

4. Measure Cost Tables

4.1 General

Grantees may enter default values for total measure unit costs, labor hours and measure specs.

This is optional for all but Fixed Fee grantees but is strongly encouraged for all to reduce data entry on measure costing.

Each total measure unit cost should include all material, labor and applicable program support costs.

Units of measurement are set by REB and are not editable by grantees at any time.

A new set of measures will be created for each contract year. Each grantees measure defaults will be copied from one contract year to the next. Grantees will be responsible for updating their defaults as necessary for the new contract.

Non-Fixed Fee grantees will be able to edit their measure default table at any time during the contract.

Fixed-Fee grantees will only be able to enter the measure total unit costs once after final contract negotiations have been completed and will not be allowed to edit these during the contract.

Fixed-Fee grantees will be able to edit labor hours and specs during the contract period.

4.2 Adding/Editing measure default values

Select Admin | Set Measure Defaults.

The entire measure list for the default (current) contract year will display.

Enter new values and/or specifications or edit existing records.

Click Save All.

Warning: It takes 35-40 seconds for the measure costs table to save. Do not click anything else on the system until the save is complete.

Save your measure cost table several times while adding data to avoid having your session time out and losing entered data. The session time is currently set to 30 minutes.

5. Buildings

5.1 General

The WisWap building ID is a sequential numbering system without regard to grantee ID or contract year. New building ID's start at 20000 to accommodate the closed buildings that were move over from the old WisWap system.

The grantee ID, and contract year are assigned by the system. The Grantee ID is set based on the person adding the building.

Total number of units is a separate required field entered by the grantee. This field represents the total number of units in the building.

Number of units weatherized has been moved from the workorder to the building and is a required field. This field represents the number of units receiving weatherization services.

Date last worked performed: If the building had received services in the past the last completion date will be displayed here if the building already exists on WisWap or will be entered by the grantee if the building is new to WisWap.

The city, state, and zip code have been moved from the unit to the building requiring entry of this information only once.

County has been added to the building and is populated as part of the City/State/Zip Code search performed to add a building.

Building type is now entered on the building rather than the application.

An application is not allowed for Shelters. Shelters are no longer a building type but rather a check box indicator on the building.

Landlord and fuel vendor information are required when a building is marked as Master Meter Electric, Vacant, or Shelter.

Public Benefits eligibility is set on the building. The first application associated to a unit address will determine the PB status for the building, unless the building is Master Meter Electric, Shelter or Vacant.

Public Benefits Override: When there is no electric vendor that serves a building the grantee will contact REB. REB will check mark the PB Override box and set the PB Eligibility status (either yes or no). Application eligibility can not be determined unless an electric vendor is associated with the application or the PB Override box is checked.

Agency auditor and inspector information was moved to the building from the work order.

Grantees will no longer close buildings. The system will automatically close the building when all units have a status of Complete, Customer/Landlord Refuses Service, or Dis-Allowed, and all invoices related to the building have a status of DOAS Approved.

Units will be marked complete when Original jobs have a Completion Date entered.

The building record now has a text field for entering directions.

5.1.2 Master Metered, Shelters and Vacant Buildings

Changes to Master Metered, Shelters and Vacant Buildings:

An indicator now exists on the building record for each of these situations.

Fuel vendor information will be required on the building record for each of these situations and must be present before the user may add a building unit address record.

Shelter is no longer a building type.

Shelters will not have an ownership status or an occupancy status.

Applications may not be created for Shelter and Vacant buildings.

Currently Vacant buildings may only be weatherized using PB funds..

5.1.3 Building Searches

General Search:

To edit or view an existing building search on the numerous fields available. The more refined you make the search parameters the fewer records that will be returned.

Add Building Search:

To add a building a search must be conducted on Unit Address, City, County, State, and Zip. The City, County and State information is populated based on the zip code entered.

5.2 Creating a Building record

To add a new building record click Building | Add New.

Enter a partial or complete address. (Note: Do not include Apt./Unit #'s in your search just the street number and Name).

Enter five-digit zip code and click Lookup City/State or tab out of zip code field.

Click Search.

If multiple city and/or county combinations are associated with the zip code searched on, then the system will prompt the user to select the correct one from a drop down list.

If a building record is found that matches your search criteria you'll be taken to the Building Summary page for that building.

If multiple records are found a list of buildings will be displayed. To select a building click the underlined blue Building ID.

If no records are returned you will be taken to the "Add Building" screen. City/County/State/Zip Code data entered in your search will be preserved to the new building record.

Enter all required information. If the building is a Shelter, Vacant, or Master Meter Electric be sure to mark the correct indicator.

5.2.2 Adding a Landlord to a building

Landlord information is required information for shelter and vacant buildings.

Other than the above rule, landlord information is optional.

To associate a landlord with a building click on the "Select Landlord" link on the add/edit building page.

Either add a new landlord or search for an existing landlord record to associate to the building.

If entering a new landlord that is a company, enter the company name in the first name field.

Search by first or last name. Select a landlord to associate to the building by clicking the Landlord ID#.

5.2.3 Adding a Fuel Vendor to a building

Click the Add Fuel Type Info in the middle of the Building Summary page to add fuel information to a building.

This will be required and only allowed when a Master Metered Electric, Shelter, or Vacant Building indicator is marked. A fuel vendor must be entered for these three types of buildings before the user will be able to add a unit address.

5.3 Editing an existing building

To edit an existing building begin by performing a search for the building.

Click Building | View/Edit Building.

Enter one or a combination of search parameters and click Search. (*The more refined you make your search the fewer records that will be returned*).

If no records are found you will remain on the search page. Verify and/or refine your search parameters and search again.

If one record is found you will be taken to the Building Summary page for that building.

If multiple records are returned select the correct building to edit by clicking on the underlined blue Building ID to go to the Building Summary page.

Once at the Building Summary page click on Edit Building to modify information contained on the building record.

5.4 Deleting a Building

In order to delete a building **all** of the following rules must be met:

- **The building is Open, and,**
- **A Job is not associated with any building units.**

When a building is deleted all of the building units and associated applications will also be deleted.

Detailed steps:

Search for the building to be deleted.

On the Building Summary page click Delete.

6. Building Unit Address

6.1 General

City, zip code and county are already associated to the unit through the building search and preserved to the Building Unit (Add New) page.

A unit record address may be cloned for multi-unit buildings. Click the "Save/Duplicate" to create a new unit record with the same address line 1, city, zip and county. (The identical address may not exist twice on the same building.)

Address line 2 should be completed when there is a more specific unit identifier (Apt. #, Upper/Lower, PO Box, etc.)

To add an application to a unit address the 'Has Application' indicator must be marked on the unit record.

Vacant and Free-rider are unit address indicators for non-applicant units. If either of these is marked then an application may not be associated with the unit.

Ownership indicator has been moved from the application to the unit and is a required field. Grantees will need to determine and set the ownership status for all units, except shelters.

Each unit in a building must have a unit address record with a unique address.

Units have a production status:

- No Status (default, system set),
- In-progress (default when a job is associated, system set),
- Complete (when it's Job has a Completion Date entered, system set),
- Deferred (unit is eligible to receive service but can't now, user set),
- No-treatment (unit is eligible but no measures were installed, user set),
- Customer/Landlord refuses service (user set),
- Dis-allowed (unit is dis-allowed, EAB Only)

Unit status override: Utilized to change a system set status to a user set status and back again.

6.1.2 Vacant and Free Rider units

Building unit address records that are not occupied or are occupied by a financially ineligible household must be marked as either Vacant or Free Rider units respectively.

6.2 Adding a Unit to a Building

On the Building Summary screen click Add Building Unit.

On the Building Unit (Add New) page verify that Address Line 1 is correct and enter Address Line 2 information if necessary.

Select the Ownership Type. (Required)

Enter the Number of Rooms in the unit. (Optional)

Select the correct Occupancy Status. (Required)

Check mark the Previously Weatherized box if the unit had received service in the past.

Click Save to save this building unit and return to the Building Summary page.

Click Save/Duplicate if this is a multi unit building with the same Address Line 1. Modify either Address Line 1 or Address Line 2 to add the next unit.

The system will require the number of Building Unit records to equal the number of units weatherized entered on the Building.

The system will not allow the number of Building Unit records to exceed the total number of units entered on the Building.

6.3 Deleting Unit Addresses

In order to delete a unit from a building **all** of the following rules must be met:

- **The building is Open, and,**
- **A Job is not associated to the unit.**

When a unit is deleted all applications associated to the unit will also be deleted.

Detailed steps:

Search for the building from which you will delete a unit.

From the Building Summary page click on the underlined Unit ID of the unit to be deleted.

On the Building Unit Edit page click Delete.

7. Applicants and Applications

7.1 General Applicants

An applicant record does not need to exist on WisWap prior to searching for and adding an application. When a search is conducted by SSN both the WHEAP and WisWap systems are searched. If only an applicant record is found on one or both systems the user will have the option to import the applicant and add an application to it. If both an applicant and application record is found on either system the user will have the option to import either record set.

If an applicant record is not found on either system or if the user does not want to import a found WHEAP or WisWap record, the user may add an applicant record and then add an application to the applicant.

Applicants and applications may only be added when Building Units are marked 'Has Application'.

7.1.1 Adding a New Applicant

If after searching for an applicant/application no records are found or the records found are not desired an applicant record may be created. An application may then be added to the newly created applicant record.

From the Building Summary page click Add/Search Applicant.

At the Add Applicant Search page enter the SSN of the applicant.

If an Applicant record is found, WisWap will display the Applicant ID, First and Last Name, Date of Birth, and a link to Add Application.

If no records match the SSN searched on, WisWap will display the SSN searched on and an option to Search Again or to Add Applicant.

If the SSN searched on was incorrect, then click Search Again and perform a search on the correct SSN.

If the SSN searched on was correct, and an Applicant record was not found then click Add Applicant.

On the Add Applicant page enter the birth date and First and Last Name of the applicant. The Middle Name is optional.

Click Save.

When Save is clicked a search for applications is performed of both the WHEAP and WisWap systems.

7.2 Searching to View/Edit Applicants

Click Search | View/Edit Applicant

Search for an existing applicant by SSN, Last Name, First Name, Building ID, or Grantee Building ID. This search is used to edit an existing applicant record, typically an applicant's name. An application may not be added through this search.

8. Applications

8.1 General:

Applications have different statuses:

- Eligible – The household is either financially or categorically eligible. (System set)
- Ineligible – The household is neither financially nor categorically eligible. (System set)
- Incomplete – The application is not complete enough to determine eligibility. (Default)
- Void – The application is no longer applicable to the unit (User set)

When the status field is changed from the default of 'Incomplete' the following must be completed on the application:

- At least one household member record.
- At least one household member income record.
- Must be a building and address associated to the application.
- Fuel Data entered on the application.
- All required fields.

Eligibility on an application is set when all required information has been entered and the user clicks Determine Eligibility on the Application Summary page. The system will set the application to Eligible or Ineligible depending on the information contained on the application, or, will not determine eligibility if any required information is missing.

Application Income Date
This date is used to establish the months that correspond to the household income used to determine eligibility. The date will be populated by the WHEAP application date if the application was imported from WHEAP.

If the grantee creates the application this will be a required field and should be the date the applicant applied for services.

This is an editable field, except if, the application is imported from the WHEAP system.

Applications are editable until the unit associated with the application is marked complete.

If a Job is associated with a unit, then the application associated with the unit may not be deleted.

Only one eligible application may exist per unit address.

Applications will calculate by household member the presence of young children less than six years of age (<72 months) and elderly persons greater than or equal to 60 years of age.

Once an eligible application is associated to a Job, if anything changes on the application that causes the application to no longer be eligible, a warning message will display to that effect.

8.1.1 Adding an Application:

An applicant record does not need to exist on WisWap prior to searching for an application. When a search is conducted by SSN both the WHEAP and WisWap systems are searched.

To search for an Applicant/Application:

Click Add/Search Applicant on the Building Summary page.

On the Add Applicant Search Page enter the SSN of the applicant for which you are searching. Click search.

A search is conducted of both WHEAP and WisWap. The following are the possible results of your search:

- No Applicant or Application data is found in either WisWap or WHEAP. There will be a message stating this and the "Add Applicant" button will display.
- A WisWap Applicant was found with an Application, nothing was found in WHEAP: "Select" link will be in the "Action" column, an "Add Application" link will be at the end of the row.
- A WisWap Applicant was found, but no WisWap Application, and nothing was found in WHEAP: "Action" column will be blank, "no application found" will display in the "Application Date" column, and an "Add Application" link will be at the end of the row.
- Nothing is found in WisWap, an Application is found in WHEAP: "Select" link will be in the "Action" column, an "Add Application" link will be at the end of the row.
- A WisWap Applicant was found with an Application and an Application is found in WHEAP: For both rows, there is a "Select" link in the "Action" column, and an "Add Application" link at the end of the row.
- A WisWap Applicant was found, but no Application, and an Application is found in WHEAP: There will be a "Select" link in the "Action" column for the WHEAP row, the "Action" column on the WisWap row will be blank, "no application found" will display in the "Application Date" column for the WisWap row, and there will be an "Add Application" link at the end of each row.

8.1.2 Importing an application from WHEAP

To import a WHEAP application, click Select on the row that has WHEAP in the system column.

The latest eligible application will be imported from WHEAP.

After the import is complete you will be taken to the Application Add/Edit page.

Enter and/or correct any information on the page as necessary.

When all required information is complete, click Save. The Application Summary page will now be displayed.

Verify that all information is correct including Fuel Type/Vendor, Household Member, and Household Member Income.

When all information is complete and verified click Determine Eligibility on the Application Summary page.

Depending on the information contained on the application the system will set the status to either Eligible or Ineligible.

Review eligibility information at the bottom of the Application Summary page.

8.1.3 Importing an application from WisWap

To import a WisWap application click Select on the row that has WisWap in the system column.

The latest eligible application will be imported from WisWap.

After the import is complete you will be taken to the Application Add/Edit page.

Enter and/or correct any information on the page as necessary.

When all information is complete click Save. The Application Summary page will now be displayed.

Verify that all information is correct including Fuel Type/Vendor, Household Member, and Household Member Income.

When all information is complete and verified click Determine Eligibility on the Application Summary page.

Depending on the information contained on the application the system will set the status to either Eligible or Ineligible.

8.1.4 Creating a new application

If an application is not found in either system or the user wishes to create a new application then click Add Application.

The Add/Edit Application page will display.

Enter all required and otherwise necessary information and click Save. The Application Summary page will now be displayed.

8.1.5 Adding Fuel Vendor/Type

To add a new Fuel record to an application click Add Fuel Type Info on the Application Summary page.

Enter all required information.

Notes: One of the fuel records on an application must be marked as Primary Heat.
One fuel record must be an electric fuel record so that Public Benefit eligibility can be determined.

Contact DOE to set the PB status if there is not an electric provider to a unit.

8.1.6 Adding Household Members

To add a Household Member to an application click Add Household Member on the Application Summary page.

Enter the required information and click Save.

To continue entering household members click Save/Add New Member to bring up a blank household member page.

Clicking Cancel will return to the Application Summary page.

8.1.7 Editing Household Members

To edit a household member click on the Household Member name on the Application Summary page.

8.1.8 Adding Household Member Income

Household Members must be added before income may be entered.

On the Application Summary page click the Add Income link for the appropriate household member.

Enter all required information and click Save.

To continue entering additional income or deduction records for this household member click Save/Add New Income to bring up a blank household income page.

Clicking Cancel will return to the Application Summary page.

8.1.9 Editing Household Member Income

To edit a household member incomes click the ± next to the household member name on the Application Summary page.

Select the income to edit by clicking on the Income Type.

8.2 Editing an application

An existing eligible application may be edited up until the Unit associated to the application is marked complete.

To find an application to edit, perform a search for the building the application is associated with.

On the Building Summary page click on the Applicant Name on the unit address record.

To edit an application, the status must be set to Incomplete. When the status is Incomplete Edit Application will be available to select on the Application Summary page.

To set an application to Incomplete click Re-Open Application on the Application Summary page.

When editing is complete remember to click Determine Eligibility to reset the eligibility status.

8.3 Re-certifying an application

A warning will display that re-certification may be necessary if the Eligibility Certification Date is greater than twelve months old from the date the user is adding or editing the application.

To re-certify an application, click the Re-certified checkbox and enter the date the application was re-certified. The months used for income eligibility will be changed to the three complete months prior to the month of the re-certification date.

9. Jobs

9.1 Jobs General

Three Job types: Original, Correction, and Rework.

Only one Original Job is allowed per unit.

Reworks and Corrections may only be added for the parent Job they are related to.

1-4 unit buildings require a separate job for each unit.

5+ unit buildings may have all units associated to one job or may have multiple jobs.

Common area work in buildings with 2 or more units is entered on a common area job. Do not mix common area measures with work performed in a particular unit.

Units of measurement for measures are set by DOE and are not editable by grantees.

A Job and it's associated unit(s) are closed and counted when a Completion Date is entered on the Job. A Completion Date may be entered on a Job when all the measures are check-marked 'Ready for Invoice' or 'Not Installed'.

Measure costing may be performed one measure at a time or as a batch of measures on a job.

Cost summary by Fund, H&S, and JCR is available for each job.

Summary of all Original, Correction, and Rework jobs related to a unit(s)

9.2 Job Pages

9.2.1 Job Add/Edit

Contains information that pertains to the entire job including unit(s) associated, Job Status, Contract #, Area Type, Grantee Unit Job #, Work Start and End Dates.

9.2.2 Job Details

This is the destination page when navigating from the Building Summary.

Primary navigation page for a Job with links to all other job pages.

Contains detail information for individual jobs including measure description, measure costing, funds used, and totals.

The measure names are links to the Add/Edit Measure detail for that measure.

9.2.3 Job Add/Edit Measures

Accessed via Add/Edit Measures on the Job Details page or through the measure links on the Job Details and Job Costing pages.

Allows users to add/edit/delete and cost measures.

Contains detail information for an individual measure including measure description, unit of measurement, measure costing, funds used, and totals.

The only page where spilt funding a measure may occur.

9.2.4 Job Costing

Accessed via the Job Costing link found on the Job Details, Add/Edit Measures, and/or Job Summary pages.

Provides the ability to cost all measures on a Job at once.

Contains detail information for an individual job including measure description, measure costing, funds used, and totals.

Split funding is not allowed on this page.

9.2.5 Job Summary

Accessed via Job Summary link found on the Job Details, and Job Costing pages.

Provides a summary rollup of an Original Job and any Rework and/or Correction Jobs associated with it.

9.2.6 Workorder

Two printable workorders are available: one for crew and one for contractor.

Accessed via the Printable Workorder link on the Job Details page.

Can be exported to Excel.

9.3 1-4 Unit Buildings vs. 5+ Unit Buildings

9.3.1 Job rules

One Original Job allowed per unit per building weatherization cycle.

Each unit receiving weatherization in a 1-4-unit building must have its own Original Job.

5+ unit buildings may have one or more units in the building associated to an Original Job.

For a Job to be added to a unit(s) each unit(s) must have an eligible application, be marked as a vacant or free rider unit, or the building is a Shelter.

Jobs are added to a unit from the Building Summary.

9.4 Adding a Job

On the Building Summary under the Building Unit Summary section check mark the radio in the Job column next to the building unit(s) you wish to create a Job for.

Click Add Job at the bottom of the Building Summary page.

The Add Job page will display. Complete all required fields and click Save.

If weatherization is performed in a common area add a common area job from the building summary screen. Do not mix common area measures with measures installed in a household unit.

An Original Job must be associated to a unit(s) before a Common Area Job may be added.

9.5 Editing a Job

A job may not be edited after it has a Completion Date entered.

The Completion Date may be removed until all measures are invoiced to allow edits.

To edit a job click on the Job ID on the building summary page of the job you wish to edit.

On the Job Details page click Edit Job.

9.6 Adding and Removing Building Units on a Job

Building units may be added to and taken off of a job until the job is complete, except, that the last address may not be removed if measures have been invoiced.

To add or remove building units click Edit Job on the Job Details page.

Add or remove building units by check marking or un-check marking the radio button or check box next to the address and clicking Save.

9.7 Associating a Contract

A contract is assigned to a job on the Add/Edit Job screen. Click the Contract # drop-down list to assign a contract to a Job.

A contract is not required to add a job.

A contract is required to invoice job measures.

To invoice a job in the current contract production period, the job must be associated to that contract by June 30th, the contract end date. The job measures may be expensed in July for the June report period.

<u>After July 1st only the new contract will be available to associate to a job.**</u>**

To add a job to the system prior to the start of a new contract and without associating it to the current contract, set the contract field to 'None Selected'.

Through proper planning, selecting or not selecting a contract will allow grantees the flexibility to maximize grant funds, and allow data entry to be continuous across contracts. Jobs may be carried from one contract to another by setting the contract to the new contract year.

9.8 Adding Measures

Click Add/Edit Measure on the Job Details page.

Click Add Measure. A dialog box will display.

Select a measure category from the first (left) box.

Select a specific measure from the second box and click OK.

The dialog box will disappear and a data entry screen for the selected measure will display.

If you have filled out your Grantee Measure Cost table the estimated Labor Hours, Unit Cost, and Measure Specification will be filled in. The estimated figures will also be populated in the Actual fields.

Enter an amount in the Estimated Quantity field and click Save Measure.

To add additional measures click the Add Measure .

<u>Required Fields</u>

The following measures will have an additional required data entry field:

Air Sealing	Pre-Test CFM50
Attic Insulation Floor Insulation Foundation Insulation Sillbox Insulation Wall Insulation	Existing R-Value
Door Replacement Window Replacement	Number of Windows or Doors Installed

9.9 Editing Measures

Measures may not be edited after they are invoiced.

There are several ways to access the Edit Measure page:

- Click Add/Edit Measures on the Job Details page. Once at the Edit Measure page, select a measure to edit from the Existing Measures drop down list, or, click on one of the measure links at the bottom of the page.

- From the Job Details or Job Costing page click on the measure link to go to the Edit Measure page for the selected measure.

Make necessary changes to the measure detail and click Save Measure.

10. Job Costing

10.1 Timing

All measures marked Ready for Invoice will be included on the next invoice regardless of when the measure costing was completed.

10.2 Quantity, Unit Cost, and Total Cost Fields

To cost a measure the Quantity, Unit Cost and Total Cost fields are required.

Unit Cost and Total Cost fields work together, one will change dependant on changes made to the other.

(Ex. Attic Insulation Blown Cellulose Unfloored R-38: Rather than figuring out the per sq. ft unit cost, enter in the total sq. ft insulated in the Quantity field and then the Total Cost. The Unit Cost will then be calculated. Likewise, if the Unit Cost field is modified the Total Cost field will be updated.)

10.3 Measure by Measure Costing Method

Measure costing may be done at the same time the measure is added to the system.

On the Add/Edit Measure screen complete the Estimated and Actual Quantity field, Estimated and Actual Unit Cost or Total Cost field. *(Estimated costs are optional unless a workorder with estimates is desired.)*

After entering quantity and cost information in the Actual fields, the Net Cost-Invoice Amount field under the Measure Invoicing part of the screen will display in Red the Total Measure Cost.

To mark a measure 'Ready for Invoice' the Net Cost-Invoice Amount field must equal $0.00 which represents the sum of Measure Cost Reductions + Measure Funds.

If the measure has Job Cost Reduction (JCR) funds, click on the appropriate JCR source under Measure Cost Reductions and click Add. Enter the amount of JCR funds.

If there are multiple JCR funds, add each that applies and the amount for each.

Next click on a fund source under Measure Funds and click Add.

To cost a measure completely in one fund source, enter the amount displayed in Red in the Net Cost-Invoice Amount.

To split fund a measure in multiple fund sources, add the appropriate funds sources and amounts for each until the Net Cost-Invoice Amount equals $0.00.

When the Net Cost-Invoice Amount equals $0.00 check mark the 'Ready for Invoice' box to include the measure on the next invoice.

If a measure was not installed check mark ‘Not Installed’ without adding any JCR or Program fund sources.

Click Save Measure when you are finished.

10.4 Entire Job Costing Method

The Job Costing page allows measure costing of all measures on a Job at once.

Click the Job Costing on the Job Details or Add/Edit Measure pages to access the Job Costing page.

Enter Actual Quantity, Unit Cost or Total cost figures.

Select JCR funds and enter the amount (if necessary).

Select a fund and enter the amount.

The Net Cost field will display as Error highlighted in Red until JCR funds + Program funds equals the measure Total Cost.

Check mark the measure ‘Ready for Invoice’.

Repeat for all measures on the Job. When finished click Save or Save and Close. (Save and Close will return to the Job Details page).

Split funding is not allowed on the Job Costing page. To split fund a measure click on the measure link to go to the Add/Edit Measure page for that measure.

10.5 Marking for Invoice

For a measure to be included on an invoice it must be check marked “Ready for Invoice’.

The next invoice created will include all measures that have not previously been invoiced that are check marked ‘Ready for Invoice’.

10.6 Closing Jobs

A job is closed when it has a Completion Date entered.

For a Completion Date to be entered all measures on the Job must be check marked ‘Ready for Invoice’ and/or ‘Not Installed’.

Entering a Completion Date on a Job will set the status of all associated units to Complete.

Only units with a status of Complete will be counted toward production goals.

Completion Date may be entered on the Job Costing page or on the Add/Edit Measure page.

10.7 Voiding Jobs

If a job has been partially invoiced but will not be completed and reported under the current contract, then the job must be voided to allow a new job to be added under the next contract.

In order for a job to be voided all previously invoiced measures must zeroed out by adding a correction job.

To add a correction job, select the parent job from the Building Summary page by clicking on the Job ID#.

Click Add Rework/Correction on the Job Details page.

On the Add/Edit Job page select Correction from the Job Type drop-down list.

Select a contract # and click Save.

On the Job Details page click Add/Edit Measure.

On the Add/Edit Measure page click Add Measure.

Select the Measure Category and Measure of all previously invoiced measures.

On the Change line enter as a negative the quantity and total cost that appear on the Previous Actual line. This should make the values in the New Actual line zero.

Select the same fund (and reduction source, if applicable). Enter the amount displayed in Red in the Net Cost-Invoice Amount as a negative number.

When the Net Cost-Invoice Amount equals $0.00 check mark the ‘Ready for Invoice’ box to include the measure on the next invoice.

After the invoice that is associated with the correction job has been approved by DOAS the Original Job must be set to Void.

Navigate to the Original Job from the Building Summary.

Click Edit Job.

In the Job Status box select Void.

Click Save.

11. Rework and Correction Jobs

11.1 General

Rework and Correction Jobs will be added from the Job Details page of the Original Job that they are related to.

Corrections must take place in the same contract.

A Rework or Correction job may only be added after the parent job has been fully invoiced and has a Completion Date entered.

11.2 Rework Jobs

Before a grantee may create a Rework Job DOE must authorize the rework by check marking the rework box on the appropriate unit(s) record.

The job that a Rework Job is being added to must be closed in order to add the Rework job.

Rework: Previously Installed Measure vs. New Measure

When a rework is performed on a previously installed measure the costing screen will appear the same as a Correction. On the Change line enter only what has changed so that the Actual line now accurately reflects the quantity and cost of the original measure and the rework combined.

If the rework involved the installation of a new measure, select the measure category and measure as normal.

11.2.1 Detail Steps

To add a Rework job, select the parent job from the Building Summary by clicking on the Job ID#.

Click Add Rework/Correction on the Job Details page.

On the Add/Edit Job page select Rework from the Job Type drop-down list.

Select a contract # and click Save.

On the Job Details page click Add/Edit Measure.

On the Add/Edit Measure page click Add Measure.

Select the Measure Category and Measure requiring a correction.

11.3 Correction Jobs

To add a correction job, select the parent job from the Building Summary page by clicking on the Job ID#.

Click Add Rework/Correction on the Job Details page.

On the Add/Edit Job page select Correction from the Job Type drop-down list.

Select a contract # and click Save.

On the Job Details page click Add/Edit Measure.

On the Add/Edit Measure page click Add Measure.

Select the Measure Category and Measure requiring a correction. *(Only measures that are found on the parent job will be available for selection on the Correction Job.)*

On the Change line enter only what has changed so that the Actual line now accurately reflects the desired quantity and/or cost.

(Ex. Attic Insulation Blown Cellulose Unfloored R-38: Originally invoiced for a Total Cost of $2,000. An invoice was missed for $100. On the correction measure enter $100 in the Total Cost field. This will result in a new Actual Unit and Total cost. The Quantity stays the same.)

Correction Jobs allow positive and negative amounts to be entered.

Select the same fund (and reduction source, if applicable).

When the Net Cost-Invoice Amount equals $0.00 check mark the 'Ready for Invoice' box to include the measure on the next invoice.

12. Invoices

12.1 General

Thirteen invoice periods: 12 production periods and 1 closeout period.

Invoices may be created prior to the end of a report month.

If an invoice period is skipped, then the system will create a $0 invoice for the missed period when the next invoice is created.

Invoice statuses:

Invoice Status	Description
Draft	Invoice has been created, but one or more fund expenditure reports have not been approved.
Final Draft	All expenditure reports are approved, but the Invoice has not been submitted to a Grantee Approver.
Prepared	Invoice is awaiting approval by Grantee Approver (Invoice is locked from this point forward)
At DOE	Invoice is awaiting approval by DOE
At DOAS	Invoice is awaiting final approval by DOAS
DOAS Approved	Invoice was approved by DOAS
Denied - Grantee	Invoice was denied by the Grantee Approver
Denied - DOE	Invoice was denied by DOE
Denied - DOAS	Invoice was denied by DOAS

Invoices are forwarded for approval to a common grantee Inbox. Anyone with rights as an invoice final approver will have access to the Inbox and be allowed to approve the invoice.

Invoices are forwarded to a common DOE Inbox for approval. Anyone with approval rights at DOE will have access to the Inbox and be allowed to approve the invoice.

Invoice line items may be locked from data entry.

The Inbox link will only appear if you have rights to create or approve an invoice. The link appears at the right side of the menu bar. The link will only be active if a message **is in the** inbox. When new messages arrive the number of new messages will be displayed next to the Inbox link.

12.2 Creating an Invoice

Click on the Invoice menu item and select Add Invoice.

Click Create Invoice for the current report month.

All previously non-invoiced measures that were marked ‘Ready for Invoice’ will be included on the invoice and locked from editing. The invoice Contract month will appear on each job measure included on the invoice.

To make any changes to measure costs, click the cancel without saving the invoice.

If the invoice looks correct, enter your other costs (admin, liability, audit, TTA, etc.) and click save.

12.2.1 Creating an Early Invoice

After the 15th day of a report period an invoice may be created for that current report period. Caution: This functionality should be used carefully. You will not be able to create another invoice until the next reporting period.

12.3 Approving Expenditure Reports

Once the invoice has been saved the status is set to Draft.

Click the + to the left of the Invoice you just created. This will display the underlying DOE, EAP, and PB expenditure reports.

Click a fund report to open it and click Approve if everything looks ok.

Once all expenditure reports have been approved the status will change to final draft.

12.4 Forwarding to Agency Approver

To forward an invoice for final approval within your agency, open the entire invoice by clicking on the invoice ID.

Click Send to Approver. This will send the invoice to the grantee inbox.

Any user of the grantee that has final invoice approval rights will have access to the Inbox.

12.5 Forwarding to DOE

To forward an invoice to DOE open the Inbox by clicking on the Inbox link.

Open the invoice message by clicking Open.

To approve the invoice, click Submit to DOE this will send the invoice to the DOE Inbox for approval.

12.6 Invoice Denials

A Grantee Approver, DOE, or DOAS may deny invoices.

When an invoice is denied the invoice and a message of denial is sent to the grantee inbox.

The invoice creator may either edit or delete the denied invoice.

Click Edit Invoice to make changes to the invoice. Underlying expenditure reports must be re-approved to forward the invoice for approval.

Click Delete to delete the invoice. Be aware that deleting an invoice will release all associated measures. When you re-create the invoice all non-invoiced measures marked for invoice will be included.